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## Netherlands

### Tobacco and Products

### Annual

### 2003

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**Report Highlights:**

During 2002, Dutch cigarette production recovered to a new record of 126.3 billion. Brazil became the main exporter of unprocessed tobacco to The Netherlands.

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Includes PSD Changes: Yes  
Includes Trade Matrix: Yes  
Unscheduled Report  
The Hague [NL1]  
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## Executive Summary

### Production

The Netherlands is one of the major tobacco processing countries in the world. After five years of expansion, total Dutch cigarette production declined by 2 percent to 120.4 billion cigarettes in 2001. During 2002, however, Dutch cigarette production recovered to a new record of 126.3 billion. The Netherlands is the second largest cigar manufacturer in the world after the United States and by far the largest producer of roll-your-own tobacco in Europe. Dutch cigar production increased from 1.8 billion in 1996, to 2.2 billion in 2001. Production of cut tobacco had been stable between 1997 and 2001, but increased by 2.5 percent to 31,000 MT in 2002.

### Consumption

According to the Dutch Central Bureau of Statistics, 28 percent of women and 37 percent of men smoke. Smoking is strongly related to age and educational level. Although the percentage of smokers decreased during the past five years, the number of cigarettes sold reached a record level of 16.9 billion in 2002, with a value of Euro 2.55 billion. Sales of cigars increased from 425 million in 1996, to 515 million in 2001, with a value of Euro 0.15 billion. This trend is expected to continue, with demand increasing for premium cigars. During the past five years, Dutch cut tobacco sales first increased to a peak of 14.3 million kg in 1999, but then declined to 12.4 million kg in 2001 (Euro 0.86 billion), and 13.2 million kg in 2002 (Euro 0.93 billion). The lower sales could be explained by the negative health effects of the stronger varieties of cut tobacco. Supermarkets are the most important sales outlet for tobacco products in The Netherlands but their market share appears to have stabilized during the past two years.

### Trade

Since 1999, Dutch imports of tobacco have declined steadily from 113,000 MT to 102,000 MT in 2002. The U.S. has historically been the main supplier of tobacco to the Dutch market with a market share of 25 to 30 percent. In 2002, however, Brazil became the main exporter of unprocessed tobacco to The Netherlands. The U.S. lost market share mainly due to falling imports of stemmed and stripped tobacco, in particular the varieties Flue Cured Virginia and Light Air Cured Burley. Trade sources informed FAS/The Hague that, due to the lower price, Brazilian tobacco was preferred above tobacco produced in the U.S. The Netherlands is second largest cigarette exporter in Europe, most of the Dutch production and imports are exported to Italy and France. During the past two year Dutch cigarette production increased from 123 billion to 126 billion. It is anticipated that domestic consumption of flue-cured tobacco will increase to nearly 43,750 MT in 2003, due to expanding cigarette production in The Netherlands.

Conversion rates:

**1997** EURO 1.00 = US\$ 1.16, **1998** EURO 1.00 = US\$ 1.08, **1999** EURO 1.00 = US\$ 1.06,

**2000** EURO 1.00 = US\$ 0.92, **2001** EURO 1.00 = US\$ 0.90, **2002** EURO 1.00 = US\$ 0.95

May **2003** EURO 1.00 = US\$ 1.16

## Production

The Netherlands is one of the main tobacco importing and processing countries in the world. Currently, there are 27 companies with annual sales of Euro 4.8 billion. About 5,700 people are employed in the Dutch tobacco industry. Indirectly, about 25,000 work in distribution, wholesale, retail and advertising. The Dutch Government receives Euro 1.6 billion from excise taxes yearly (VAT not included).

In The Netherlands, tobacco production is negligible. Tobacco production in the EU is funded by about Euro 1 billion yearly. In March 2002, the EC agreed to reduce aid rates for low quality tobacco by 10 percent for the next three years.

## Cigarettes.

*Dutch cigarette production reached a new record level.*

After five years of expansion, total Dutch cigarette production declined by 2 percent from 123.1 billion cigarettes in 2000 to 120.4 billion in 2001. During 2002, Dutch cigarette production recovered to 126.3 billion. Dutch cigarette production increased despite lower tobacco imports. Part of the import reduction is attributable to stock-piling in 2001. The two largest cigarette manufacturers in the Netherlands are BAT Manufacturing B.V. and Philip Morris Holland B.V. Currently, Phillip Morris is responsible for about 40 percent of cigarette production in The Netherlands, of which about 95 percent is exported.

The two major Dutch cigarette manufacturers are:

### **B.A.T. Manufacturing Nederland b.v.**

Kerkstraat 27  
6901 AA Zevenaar  
Tel. 31-316-590911

### **Philip Morris**

Groenelaan 5  
1186 AA Amstelveen  
Tel. 31-20-6564100

Since the Dutch tobacco industry has an extensive production of cigar and cut tobacco (roll-your-own, pipe- and chewing tobacco) production, a brief overview of these products follows.

## Cigars.

*Dutch cigar production and exports increased.*

Dutch cigar production increased steadily from 1.8 billion cigars in 1996 to 2.2 billion in 2001. The Netherlands is the second largest cigar manufacturer in the world after the United States. A substantial part of Dutch cigars are partially processed by affiliates located just across the Belgian border, in Ireland and even Sri Lanka. In most cases, semi-manufactured cigars are made in the "foreign" affiliates, subsequently "exported" to the Netherlands and finished in this country. The Dutch Central Bureau of Statistics considers both cigars that have been entirely produced in the Netherlands and those semi-processed at a foreign affiliate to be domestic production.

In 2001, Dutch cigar and cigarillo exports increased by ten percent to 1.94 billion pieces. Dutch cigars and cigarillos are exported to more than 100 countries. The leading export destinations are France, 738 million in 2001 (626 million in 2000), the UK, 251 million in 2001 (180 million), and Germany, 173 million in 2001 (210 million).

### Smoking and Cut Tobacco.

*Dutch production followed expanding export sales.*

The Netherlands is by far the largest producer of roll-your-own tobacco in Europe although it is also produced in the U.K., Germany, Norway, Denmark and France. Production of roll-your-own, pipe- and chewing tobacco had been stable between 1997 and 2001, but increased by 2.5 percent to 31,000 MT in 2002. Imperial Tobacco Nederland R.Y.O. B.V., Koninklijke Theodorus Niemeyer B.V., Tabaksfabriek Heupink & Reinders B.V., Tabakskerverij J.B.G. Bloemen B.V. and Biggelaar Tabak B.V. account for all production of cut tobacco products.

Between 1996 and 1999, Dutch exports of packed, cut tobacco declined from 14,800 MT to 13,900 MT, respectively. During the last three years, Dutch exports recovered to 15,800 MT in 2002 with a value of Euro 229 million. The Dutch roll-your-own tobacco industry is working very hard to develop export markets as they believe it is the only avenue to expand sales. Germany and Belgium are already important customers of the Dutch roll-your-own tobacco industry, while the French market is trending upwards.

The four producers of roll-your-own and pipe tobacco in the Netherlands are:

#### **Tabakskerverij J.B.G. Bloemen B.V.**

De Mors 120  
7631 AK Ootmarsum  
Tel. 31-541-291218

#### **Tabaksfabriek Heupink & Reinders b.v.**

De Mors 84  
7631 AK Ootmarsum  
Tel. 31-541-291285

#### **Imperial Tobacco Nederland/Van Nelle Tabak Nederland**

Tabaksmatschappij B.V.  
Van Nelleweg 1  
3044 BC Rotterdam  
Tel. 31-10-4464444

#### **Koninklijke Theodorus Niemeyer b.v.**

Theodorus Niemeyerstraat 1  
9726 BB Groningen  
Tel. 31-50-3664911

### Consumption.

*Despite the percentage of smokers has gradually declined, cigarette sales reached a new record in 2002.*

According to the Dutch Central Bureau for Statistics, 28 percent of women and 37 percent of men smoke. During the last decade, the percentage of smokers has declined. Smoking is strongly related to age and gender. For both men and women, the percentage of smokers is the highest under 18-24 year old people, remains relatively stable from the category 24-34 year up to the category 45-54 year old, and drops strongly for the category older than 54 year old. The low percentage of female smokers in the age class 25-34 year old is probably related to temporary stop during pregnancy. Another factor is education. In general, the higher the educational level, the less people smoke.

<b>Dutch Population Smoking Statistics (Percentage)</b>							
	<b>1996</b>	<b>1997</b>	<b>1998</b>	<b>1999</b>	<b>2000*</b>	<b>2001</b>	<b>2002</b>
Total of Population	36.0	35.8	34.7	34.0	31.5	33.3	32.3
Men	40.5	39.4	38.7	36.3	34.6	37.4	36.5
Women	31.7	32.3	30.8	31.8	28.5	29.3	28.2

Source: Central Bureau for Statistics \* As from 2000, a new statistical method has been used.

<b>Dutch Population Smoking Statistics</b>
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(Age in years)								
	12-17	18-24	25-34	35-44	45-54	55-64	65-74	75>
Total of Population	16.1	42.6	37.0	38.1	39.4	29.1	20.1	13.2
Men	15.6	47.0	44.3	39.9	42.8	32.2	24.0	20.7
Women	16.5	38.0	29.4	36.2	36.0	25.9	16.7	8.8

Source: Central Bureau for Statistics

Domestic Sales of Tobacco Products in The Netherlands							
	1996	1997	1998	1999	2000	2001	2002
Cigarettes (million pieces)	15,425	16,640	15,631*	16,543	16,679	16,309	16.852
Cigars (million pieces)	425	442	474	508	513	515	516
Cut Tobacco (million kg)	14.0	14.0	14.2	14.3	14.1	12.4**	13.2

Source: Central Bureau for Statistics, Association of the Cigarette Industry, 2002 \* Forecast of Office of Agricultural Affairs \*\* A new statistical calculation is used. \*\* Association of the Cigarette Industry attributes the decline to fluctuation in commercial stocks.

Although the percentage of smokers decreased during the past five years, the number of cigarettes sold remained relatively stable during the past five years. In 2002, the number of cigarettes sold reached a record level of 16.9 billion, with a value of Euro 2.55 billion. The reason for the increase of domestic cigarettes sales is believed to be linked to the lower sales of cut tobacco.

Domestic sales of cigars increased strongly from 425 million pieces in 1996, to 515 million in 2001, with an estimated value of Euro 0.15 billion. This is due to increasing demand by young and middle-aged consumers and women. This increase is expected to continue with consumption of premium cigars, in particular, rising. The Dutch market for cigars can be divided into premium cigars, about 20 percent of the market, medium quality cigars, about 65 percent of the market, and private label cigars, at 15 percent. Dutch cigar producers believe that there are good opportunities for cigars with added flavors and/or with filters. During the past five years, cut tobacco sales first increased to a peak in 1999 of 14.3 million kg, but then declined to 12.4 million kg in 2001 (Euro 0.86 billion), and rebounded to 13.2 million kg in 2002 (Euro 0.93 billion). The lower consumption could be explained by increased prosperity, price of cut tobacco is about three times less than cigarettes, and the strong negative health effects of the stronger varieties of cut tobacco.

As of May 2002, a label with the text "Smoking is lethal" (Roken is dodelijk) or "Smokers die younger" (Rokers sterven jonger) is mandatory on packages of cigarettes. A survey of the sector magazine Distrifood revealed that these labels have no effect on sales of tobacco products in supermarkets. A survey of the sector organization for tobacco specialty shops (NSO) confirmed this finding for the tobacco sales in their outlets.

Type Outlet for Cigarettes (percentage)	

	1999	2000	2001	2002
Tobacco Specialty Shops	25.3	25.2	24.7	24.8
Supermarkets	36.1	36.3	36.2	36.2
Petrol Stations	20.0	21.7	24.8	24.1
Restaurants & Café's	6.9	6.8	6.0	6.3
Other	11.7	10.0	8.3	8.6

Source: Association of the Cigarette Industry, 2002

Supermarkets are the most important sales outlet for tobacco products in The Netherlands. During the past decade, Dutch supermarkets strengthened their position as the main retail outlet for cigarettes. In 2001 and 2002, however, the sales percentage by supermarkets declined slightly, and appears to have stabilized. The Dutch Ministry of Health has proposed reducing the number of outlets by forcing supermarkets to choose between selling medicines or tobacco products. In the long term, the Ministry is planning to restrict sales of tobacco products to tobacco specialty shops.

<b>The Most Popular Cigarette Brands by Sales:</b>					
	1997	1998	1999	2000	2001
1. Marlboro	21.4%	21.9%	22.7%	22.9%	24.6%
2. Marlboro lights	7.7%	8.5%	9.9%	10.7%	10.3%
3. Camel filter	8.3%	8.4%	7.8%	7.7%	7.7%
4. Caballero filter	5.5%	5.7%	5.8%	5.6%	5.5%
5. Barclay	5.9%	6.0%	5.8%	5.6%	5.4%
6. Peter Stuyvesant	5.6%	5.3%	5.0%	4.8%	4.7%
7. Caballero plain	4.6%	4.2%	3.8%	3.3%	2.9%
8. Pall Mall Export filter	3.4%	3.3%	3.2%	2.9%	2.8%
9. Camel Lights	-	2.2%	2.1%	2.4%	2.4%
10. Marlboro Medium	-		2.2%	2.4%	2.7%

Source: Association of the Cigarette Industry, 2002

## Prices

<b>Prices of Cigarettes</b> (25 Piece Pack)		
<b>Date:</b>	<b>Euro</b>	<b>US\$</b>
July 1, 1992	2.31	3.03
January 1, 1993	2.50	3.03
October 1, 1994	2.56	3.32
October 1, 1995	2.61	3.64
April 1, 1997	2.79	3.20
April 1, 1998	2.93	3.17
January 1, 1999	3.04	3.52

March 1, 2000	3.15	3.02
January 1, 2001	3.43	3.22
January 1, 2002	3.54	3.12
January 1, 2003	3.65	4.23*

Source: Association of the Cigarette Industry, 2002 \*Based on average exchange rate of May, 2003.

<b>Prices of Cigarettes as of January 1, 2003</b> (Prices for 25 Piece Pack)		
	<b>Euro</b>	<b>Percent</b>
Retail price	3.65	100.0
of which:		
Excise tax	2.66	57.0
Value-added Tax	0.58	16.0
Cost and margins	0.99	27.0

Source: Association of the Cigarette Industry, 2002

The EU excise tax on cigarettes was "harmonized" in 1993 to a minimum of 57 percent of the retail price. The Netherlands implemented the EU excise tax directive in that same year. However, as different EU countries have different retail prices, excise taxes are, in reality, far from harmonized. This is especially the case in northern EU countries which have higher cigarette prices than the southern "monopoly" countries. For instance, cigarette prices in Denmark are five times higher than in Spain. Southern European countries do not want to increase their prices as they fear competition by the more popular cigarettes (mostly American blends) from the northern EU countries. In the Northern countries, higher prices boost black market sales. The illegal importation of cigarettes results in large income losses for the government and huge profits for smugglers. The European Anti-Fraud Office (OLAF) estimates that "black market" cigarettes account for up to 10 percent of the EU market - worth US \$4.1 billion in tax revenues.

## Trade

The Netherlands is the sixth largest tobacco importer, and the second largest cigarette producer in the world. As about eighty percent of the production is exported, The Netherlands is world's fourth largest cigarette exporter. During 2002, Brazil became the main tobacco supplier to the Dutch market. Dutch imports of tobacco have declined steadily from 113,000 MT in 1999 to 102,000 MT in 2002. This decline is mainly attributable due to lower imports of stemmed and stripped tobacco. During the past four years, imports of stemmed and stripped tobacco declined from about 75,000 MT to about 65,000 MT in 2002. During this period, imports of these types of tobacco have been stable at about 30,000 MT. The remaining import volume of about 7,000 MT consist of tobacco waste.

The U.S. has been the main supplier of tobacco to the Dutch market with a market share of about 25 to 30 percent. In 2002, however, the U.S. market share fell to only 17 percent. During that year, Brazil became the main exporter of unmanufactured tobacco to The Netherlands with a market share of 23 percent. The U.S. lost market share for stemmed and stripped tobacco, in particular the varieties Flue Cured Virginia and Light Air Cured Burley. Trade sources informed FAS/The Hague that, due to the lower price, Brazilian tobacco was

preferred above tobacco produced in the U.S. Despite declining sales, U.S. tobacco remains the preferred tobacco for Dutch tobacco product manufacturers, especially if the prices for U.S. tobacco are competitive with prices for tobacco from Brazil and other low cost producers.

Because of the EU's 1993 legislation for maximum levels of tar/nicotine (effective in 1998), there may be a minor shift to imports of lighter tobacco from the United States for the production of "light" cigarettes and "light" roll-your-own tobacco.

Other important exporters to The Netherlands are: other EU member states, 25 percent of the market, and Malawi, India, Argentina and Zimbabwe with each about 5 percent of the Dutch market. Indonesia is, with the U.S., one of the high value tobacco suppliers to the Dutch market. During the past four years, Dutch tobacco imports from Turkey and Tanzania have fallen from between five and ten percent to only a few percent of the market.

### **Burley**

Burley tobacco is considered almost indispensable for making the roll-your-own or "shag" tobacco which is very popular in the Netherlands. Burley tobacco is also used in cigarette blends. During the past five years, Dutch imports of burley tobacco fluctuated around 18,000 MT. In 2002, Dutch burley tobacco imports declined to 16,000 MT probably due to stock piling during 2001. In 2000, U.S. burley tobacco exports reached a peak of more than 10,000 MT. During the past two years, these exports declined to 6,300 MT. Despite this decline, the U.S. remains the main supplier to The Netherlands with 6,250 MT, followed by Brazil with 3,300 MT. In general, less than 1,000 MT of burley tobacco is re-exported by The Netherlands. Considering the expanding production of cut tobacco, it is anticipated that burley tobacco imports will at least remain about 18,000 MT.

### **Dark Air and Sun Cured**

Dark air and sun cured tobacco are used for the production of cigars. During the past four years, Dutch imports of dark air and sun cured tobacco increased steadily from 2,800 MT to more than 3,700 MT in 2002. In 2002, the main suppliers to the Dutch market were India, 776 MT, and Brazil, 639 MT. The increase of dark air and sun cured tobacco imports is in line with the growing cigar production in The Netherlands. During the past five years, domestic consumption of this type of tobacco more than doubled to more than 2,200 MT per year. In general, about two thirds of dark air and sun cured tobacco imports is re-exported to other EU member states. Considering the expanding production of cigars, it is anticipated that dark air and sun cured tobacco imports will at least stabilize at about 3,700 MT in 2003.

### **Flue Cured**

U.S. flue-cured tobacco is used for flavor. In general, Dutch imports of flue cured tobacco average around 48,000 MT per year. In 2002, Dutch imports fell to about 44,000 MT and Dutch re-exports of flue-cured tobacco declined considerably from 6,300 MT in 2001 to only 1,400 MT in 2002. It is anticipated that domestic consumption of flue-cured tobacco increased from 39,200 MT in 2001 to 43,500 MT in 2002 reflecting the increased cigarette production during this year. In 2002, Brazil was the main supplier to the Dutch market with more than 17,000 MT, the U.S. followed with nearly 8,000 MT. It is anticipated that domestic consumption of flue-cured tobacco will increase to nearly 43,750 MT in 2003, due to expanding cigarette production in The Netherlands.

### **Oriental**

In 2002, Dutch imports of oriental tobacco declined by 15 percent to nearly 10,000 MT. Greece is the main supplier of Oriental tobacco to the Dutch market.

### Cigarettes

The Netherlands is second largest cigarette exporter in Europe, most of the Dutch production and imports are exported to Italy and France. During the past two year Dutch cigarette production increased from 123 billion to 126 billion. During the same period, Dutch cigarette imports increased strongly from 15 billion in 2000 to 34 billion in 2002. Domestic use, including commercial stocks, of cigarettes declined from 39 billion to less than 26 billion in 2002. This fluctuation is attributable to stock piling by the industry and trade. Another factor is the incompleteness of the statistics since the creation of an internal EU market.

<b>Imports &amp; Exports of Unmanufactured Tobacco</b> (Metric Tons/Values in million Euros)								
	<b>1999</b>		<b>2000</b>		<b>2001</b>		<b>2002</b>	
<b>Imports</b>	<b>Volume</b>	<b>Value</b>	<b>Volume</b>	<b>Value</b>	<b>Volume</b>	<b>Value</b>	<b>Volume</b>	<b>Value</b>
Flue Cured	49,669	243	48,409	258	48,281	240	43,912	199
Burley	18,758	108	18,465	125	20,800	121	16,367	102
Dark Air	2,831	17	3,393	19	3,545	19	3,749	22
Oriental	13,603	65	9,726	47	11,764	60	9,974	56
<b>Grand Total</b>	<b>112,558</b>	<b>520</b>	<b>112,322</b>	<b>553</b>	<b>108,161</b>	<b>529</b>	<b>101,956</b>	<b>466</b>

<b>Exports</b>	<b>Volume</b>	<b>Value</b>	<b>Volume</b>	<b>Value</b>	<b>Volume</b>	<b>Value</b>	<b>Volume</b>	<b>Value</b>
Flue Cured	8,652	63	10,996	72	6,310	57	1,389	7
Burley	1,253	4	1,268	5	563	3	773	3
Dark Air	1,759	7	2,416	9	972	4	1,620	9
Oriental	832	5	553	4	1,208	7	1,911	10
<b>Grand Total</b>	<b>12,496</b>	<b>101</b>	<b>23,128</b>	<b>147</b>	<b>9,053</b>	<b>117</b>	<b>11,442</b>	<b>71</b>

Source: Central Bureau for Statistics, 2002; Grand Total: Eurostat (WTA)

**Quality, Safety and Health Regulations**

In the European Union, health regulations and anti-smoking regulations exist on both the Member State and EU levels. For regulations on EC, please contact the Office of Agricultural Affairs of the United States Mission to the EU in Brussels

(<http://www.useu.be/agri/usda.html>) or the website of the EU

([http://www.europa.eu.int/comm/health/ph/programmes/tobacco/index\\_en.htm](http://www.europa.eu.int/comm/health/ph/programmes/tobacco/index_en.htm)).

The Dutch government collects about Euro 2 billion on VAT and excise taxes and spends about Euro 1 million on prevention. In The Netherlands, health warnings, along with tar and nicotine levels, are required on cigarette packages. No advertising on billboards is allowed, except on the two Dutch racetracks. Television advertising is also prohibited.

Advertisements cannot link smoking with sports, youth, or health care and people younger than 25 are not allowed to appear in ads. Free sampling of cigarettes is banned. No advertising is permitted in the neighborhoods of health care centers and schools.

Restrictions on smoking in specific public places are currently in effect. As of May 2002, a label with the text "Smoking is lethal" (Roken is dodelijk) or "Smokers die younger" (Rokers sterven jonger) is mandatory on packages of cigarettes. The size of the label is one third of the front side and forty percent of the back side. On April 16, 2002, the Dutch Senate agreed on the following implementation schedule of the Dutch Tobacco Law:

- November 7, 2002, ban on tobacco commercials and sponsoring.
- January 1, 2003, ban on tobacco advertisement in newspapers and magazines.
- January 1, 2003, 16 years as maximum age for purchasing tobacco products, also from machines.
- January 1, 2003, prohibition on tobacco product sales in government buildings.
- January 1, 2003, prohibition on tobacco product sales in small boxes, less than 19 pieces.
- January 1, 2004, prohibition on smoking in public transportation.
- January 1, 2004, guarantee of smoking free working space.

## Statistical Tables

Trade figures of 2000 and 2001: Central Bureau for Statistics

Trade figures of 2002: World Trade Atlas (based on CBS and EUROSTAT figures)

Production and consumption figures:

Central Bureau for Statistics,

Association of the Cigarette Industry and Dutch Cigar Manufacturers Association

## PSD &amp; Trade Matrices – Tobacco; Unmfg, Total

<i>PSD Table</i>						
Country	Netherlands					
Commodity	Tobacco, Unmfg., Total (HA)(MT)					
	2001 USDA Official [Old]	Revised Post Estimate [New]	2002 USDA Official [Old]	Estimate Post Estimate [New]	2003 USDA Official [Old]	Forecast Post Estimate [New]
Market Year Begin	01/2001		01/2002		01/2003	
Area Planted	0	0	0	0	0	0
Beginning Stocks	8000	8000	12000	12000	9000	12000
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	0	26092	0	17229	0	15000
Other Foreign Imports	108150	82069	101929	84727	101929	85000
TOTAL Imports	108150	108161	101929	101956	101929	100000
TOTAL SUPPLY	116150	116161	113929	113956	110929	112000
Exports	23760	9285	21476	5693	22000	6000
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	22377	22887	39453	16267	40000	14000
Other Foreign Consump.	58013	71989	44000	79996	40000	80000
TOTAL Dom. Consumption	80390	94876	83453	96263	80000	94000
TOTAL Disappearance	104150	104161	104929	101956	102000	100000
Ending Stocks	12000	12000	9000	12000	8929	12000
TOTAL DISTRIBUTION	116150	116161	113929	113956	110929	112000

## Export Trade Matrix

Country Netherlands

Commodity Tobacco, Unmfg., Total

Time Period	CY	Units:	Metric Tons
Exports for:	2001		2002
U.S.		U.S.	
Others		Others	
E.U.	8,761	E.U.	7,404
-Belgium	2,853	-Luxembourg	2,089
-Ireland	376	-E.U. unknown	5,152
-Greece	3,692	Venezuela	1,535
Total for Others	8,761		8,939
Others not Listed	292		953
Grand Total	9,053		9,892

## Import Trade Matrix

Country Netherlands

Commodity Tobacco, Unmfg., Total

Time Period	CY	Units:	Metric Tons
Imports for:	2001		2002
U.S.	22,360	U.S.	17,229
Others		Others	
E.U.	21,381	E.U.	26,969
-Belgium	1,218	-Belgium	4,854
-Germany	6,050	-Germany	9,794
-Greece	4,585	-Greece	3,526
Zimbabwe	5,528	Zimbabwe	3,513
Brazil	16,834	Brazil	23,467
Turkey	3,649	Turkey	1,782
Malawi	1,694	Malawi	5,835
India	5,070	India	4,375
Total for Others	54,156		65,941
Others not Listed	7,874		18,786
Grand Total	84,390		101,956

## PSD &amp; Trade Matrices - Tobacco, Unmfg., Flue Cured

<i>PSD Table</i>						
Country	Netherlands					
Commodity	Tobacco, Unmfg., Flue Cured (HA)(MT)					
	2001	Revised	2002	Estimate	2003	Forecast
	USDA	Post	USDA	Post	USDA	Post
	Official [Old]	Estimate [New]	Official [Old]	Estimate [New]	Official [Old]	Estimate [New]
Market Year Begin	01/2001		01/2002		01/2003	
Area Planted	0	0	0	0	0	0
Beginning Stocks	250	250	250	3000	0	2000
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	21410	14572	0	7841	0	7500
Other Foreign Imports	26061	33709	0	36071	0	37500
TOTAL Imports	47471	48281	0	43912	0	45000
TOTAL SUPPLY	47721	48531	250	46912	0	47000
Exports	13338	6310	0	1390	0	1500
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	15360	11838	0	7770	0	7290
Other Foreign Consump.	18773	27383	0	35752	0	36460
TOTAL Dom. Consumption	34133	39221	0	43522	0	43750
TOTAL Disappearance	47471	45531	0	44912	0	45250
Ending Stocks	250	3000	0	2000	0	1750
TOTAL DISTRIBUTION	47721	48531	0	46912	0	47000

## Export Trade Matrix

Country Netherlands

Commodity Tobacco,Unmfg.,Flue Cured

Time Period  Units:   
 Exports for:    
 U.S.  U.S.   
 Others Others

E.U.	6,291	E.U.	1,090
-Belgium	1,212	-Belgium	565
-Ireland	375	-Ireland	-
-Italy	937	-Italy	254
-Greece	3,689	-Greece	249
-Portugal	77	-Portugal	22
		Russia	288

Total for Others    
 Others not Listed    
 Grand Total

## Import Trade Matrix

Country Netherlands

Commodity Tobacco,Unmfg.,Flue Cured

Time Period  Units:   
 Imports for:    
 U.S.  U.S.   
 Others Others

E.U.	6,291	E.U.	1,090
-Belgium	1,212	-Belgium	565
-Ireland	375	-Ireland	-
-Italy	937	-Italy	254
-Greece	3,689	-Greece	249
-Portugal	77	-Portugal	22
		Russia	288

Total for Others    
 Others not Listed    
 Grand Total

## PSD &amp; Trade Matrices - Tobacco, Unmfg., Burley

<i>PSD Table</i>							
Country	Netherlands						
Commodity	Tobacco, Unmfg., Burley (HA)(MT)						
	2001	Revised	2002	Estimate	2003	Forecast	
	USDA Official	Post	USDA	Post	USDA		
	[Old]	Estimate	Official [Old]	Estimate	Official [Old]	Post Estimate [New]	
Market Year Begin	01/2001		01/2002		01/2003		
Area Planted	0	0	0	0	0	0	
Beginning Stocks	3257	1257	3142	4142	0	2992	
Farm Sales Weight Prod	0	0	0	0	0	0	
Dry Weight Production	0	0	0	0	0	0	
U.S. Leaf Imports	10422	7787	0	6252	0	6500	
Other Foreign Imports	7798	13013	0	10115	0	11500	
TOTAL Imports	18220	20800	0	16367	0	18000	
TOTAL SUPPLY	21477	22057	3142	20509	0	20992	
Exports	1283	563	0	773	0	750	
Dom. Leaf Consumption	0	0	0	0	0	0	
U.S. Leaf Dom. Consum.	7929	6631	0	6400	0	6200	
Other Foreign Consump.	9123	10721	0	10344	0	11100	
TOTAL Dom. Consumption	17052	17352	0	16744	0	17300	
TOTAL Disappearance	18335	17915	0	17517	0	18050	
Ending Stocks	3142	4142	0	2992	0	2942	
TOTAL DISTRIBUTION	21477	22057	0	20509	0	20992	

## Export Trade Matrix

Country Netherlands

Commodity Tobacco, Unmfg., Burley

Time Period	CY	Units:	Metric Tons
Exports for:	2001		2002
U.S.		U.S.	
Others		Others	
E.U.	539	E.U.	745
-Belgium	464	-Belgium	282
-Germany	50	-Italy	442
Turkey	11	Turkey	3
Cyprus	10	Cyprus	9
		Poland	13
Total for Others	560		770
Others not Listed	3		3
Grand Total	563		773

## Import Trade Matrix

Country Netherlands

Commodity Tobacco, Unmfg., Burley

Time Period	CY	Units:	Metric Tons
Imports for:	2001		2002
U.S.	7,787	U.S.	6,252
Others		Others	
E.U.	6,789	E.U.	4,607
-Belgium	266	-Belgium	230
-Germany	1,572	-Germany	2,581
-Italy	4,683	-Italy	1,549
Brazil	2,918	Brazil	3,471
Malawi	597	Malawi	205
Thailand	503	Thailand	312
Argentina	1,451	Argentina	971
Total for Others	12,258		9,566
Others not Listed	755		549
Grand Total	20,800		16,367

## PSD &amp; Trade Matrices - Tobacco, Unmfg., Oriental

<i>PSD Table</i>							
Country	Netherlands						
Commodity	Tobacco, Unmfg., Oriental						
	2001	Revised	2002	Estimate	(HA)(MT) 2003	Forecast	
	USDA Official	Post	USDA	Post	USDA	Post	
	[Old]	Estimate	Official [Old]	Estimate	Official [Old]	Estimate	
		[New]		[New]		[New]	
Market Year Begin	01/2001		01/2002		01/2003		
Area Planted	0	0	0	0	0	0	
Beginning Stocks	3446	3446	2287	2287	0	1987	
Farm Sales Weight Prod	0	0	0	0	0	0	
Dry Weight Production	0	0	0	0	0	0	
U.S. Leaf Imports	0	0	0	0	0	0	
Other Foreign Imports	6954	11764	0	9974	0	10000	
TOTAL Imports	6954	11764	0	9974	0	10000	
TOTAL SUPPLY	10400	15210	2287	12261	0	11987	
Exports	368	1208	0	1911	0	1900	
Dom. Leaf Consumption	0	0	0	0	0	0	
U.S. Leaf Dom. Consum.	0	0	0	0	0	0	
Other Foreign Consump.	7745	11715	0	8363	0	8100	
TOTAL Dom. Consumption	7745	11715	0	8363	0	8100	
TOTAL Disappearance	8113	12923	0	10274	0	10000	
Ending Stocks	2287	2287	0	1987	0	1987	
TOTAL DISTRIBUTION	10400	15210	0	12261	0	11987	

## Export Trade Matrix

Country Netherlands

Commodity Tobacco, Unmfg., Oriental

Time Period	CY	Units:	Metric Tons
Exports for:	2001		2002
U.S.		U.S.	
Others		Others	
E.U.	1,092	E.U.	428
-Belgium	549	-Belgium	81
-Italy	543	-Italy	189
-Germany	-	-Germany	115
Switzerland	116	Switzerland	269
		Poland	520
		Hungary	201
		Australia	446
Total for Others	1,208		1,864
Others not Listed	0		47
Grand Total	1,208		1,911

## Import Trade Matrix

Country Netherlands

Commodity Tobacco, Unmfg., Oriental

Time Period	CY	Units:	Metric Tons
Imports for:	2001		2002
U.S.		U.S.	
Others		Others	
E.U.	6,379	E.U.	6,245
-Italy	170	-Italy	260
-Germany	1,109	-Germany	1,689
-Greece	4,585	-Greece	2,756
-Belgium	514	-Belgium	1,539
Turkey	3,648	Turkey	1,732
Bulgaria	688	Bulgaria	1,016
Albania	369	Albania	456
Malawi	147	Malawi	215
Total for Others	11,231		9,664
Others not Listed	533		310
Grand Total	11,764		9,974

## PSD &amp; Trade Matrices - Tobacco, Unmfg., Dark Air &amp; Sun Cured

<i>PSD Table</i>						
Country	Netherlands					
Commodity	Unmfg., Dark Air & Sun Cured (HA)(MT)					
Market Year Begin	2001	Revised	2002	Estimate	2003	Forecast
	USDA	Post	USDA	Post	USDA	Post
	Official [Old]	Estimate	Official [Old]	Estimate	Official [Old]	Estimate
		[New]		[New]		[New]
		01/2001		01/2002		01/2003
Area Planted	0	0	0	0	0	0
Beginning Stocks	4066	4066	3442	4600	0	4500
Farm Sales Weight Prod	0	0	0	0	0	0
Dry Weight Production	0	0	0	0	0	0
U.S. Leaf Imports	0	1	0	0	0	0
Other Foreign Imports	3966	3544	0	3749	0	3750
TOTAL Imports	3966	3545	0	3749	0	3750
TOTAL SUPPLY	8032	7611	3442	8349	0	8250
Exports	3073	972	0	1620	0	1600
Dom. Leaf Consumption	0	0	0	0	0	0
U.S. Leaf Dom. Consum.	0	0	0	0	0	0
Other Foreign Consump.	1517	2039	0	2229	0	2350
TOTAL Dom. Consumption	1517	2039	0	2229	0	2350
TOTAL Disappearance	4590	3011	0	3849	0	3950
Ending Stocks	3442	4600	0	4500	0	4300
TOTAL DISTRIBUTION	8032	7611	0	8349	0	8250

## Export Trade Matrix

**Country** Netherlands

**Commodity** Unmfg.,Dark Air & Sun Cured

Time Period  Units:   
 Exports for:  **2002**  
 U.S.  U.S.   
 Others Others

E.U.	839	E.U.	1,422
-Belgium	806	-Belgium	1,305
Switzerland	101	Switzerland	179
Dom. Rep	31	Dom. Rep	14
India	-	Sri-Lanka	4
Indonesia	-	Indonesia	1
Total for Others	971		1,620
Others not Listed	<input type="text" value="1"/>		<input type="text" value="0"/>
Grand Total	972		1,620

## Import Trade Matrix

**Country** Netherlands

**Commodity** Unmfg.,Dark Air & Sun Cured

Time Period  Units:   
 Imports for:  **2002**  
 U.S.  U.S.   
 Others Others

E.U.	60	E.U.	192
-France	17	-France	20
-Italy	19	-Belgium	103
Brazil	581	Brazil	836
Indonesia	380	Indonesia	214
India	1,359	India	936
Sri-Lanka	255	Sri-Lanka	244
Dom. Rep.	168	Dom. Rep.	436
Paraguay	445	Paraguay	400
Colombia	136	Colombia	239
Total for Others	3,384		3,497
Others not Listed	<input type="text" value="160"/>		<input type="text" value="252"/>
Grand Total	3,545		3,749

## PSD &amp; Trade Matrices - Tobacco, Mfg., Cigarettes

<i>PSD Table</i>							
Country	Netherlands						
Commodity	Tobacco, Mfg., Cigarettes (MIL PCS)						
	2001	Revised	2002	Estimate	2003	Forecast	
	USDA	Post	USDA	Post	USDA		
	Official [Old]	Estimate [New]	Official [Old]	Estimate [New]	Official [Old]	Post Estimate [New]	
Market Year Begin	01/2001		01/2002		01/2003		
Filter Production	105925	105925	86000	112292	0	113000	
Non-Filter Production	14500	14500	14000	14000	0	13500	
TOTAL Production	120425	120425	100000	126292	0	126500	
Imports	23380	23380	50000	34031	0	35000	
TOTAL SUPPLY	143805	143805	150000	160323	0	161500	
Exports	104818	104818	110000	134458	0	135500	
Domestic Consumption	38987	38987	40000	25865	0	26000	
TOTAL DISTRIBUTION	143805	143805	150000	160323	0	161500	

## Export Trade Matrix

**Country** Netherlands

**Commodity** Tobacco, Mfg., Cigarettes

Time Period  Units:   
 Exports for:  **2002**  
 U.S.  U.S.

Others		Others	
E.U.	103,113	E.U.	131,872
-France	40,371	-France	49,209
-Belgium	6,239	-Belgium	7,114
-Germany	7,150	-Germany	7,726
-Italy	40,159	-Italy	49,784
-Greece	2,824	-Greece	5,114
Switzerland	314	Switzerland	487
Slovenia	112	Bulgaria	624
Japan	253	Japan	142
Total for Others	103,792		133,125
Others not Listed	988		1,258
Grand Total	104,818		134,457

## Import Trade Matrix

**Country** Netherlands

**Commodity** Tobacco, Mfg., Cigarettes

Time Period  Units:   
 Imports for:  **2002**  
 U.S.  U.S.

Others		Others	
E.U.	23358	E.U.	33994
-France	292	-France	327
-Belgium	3586	-Belgium	2577
-Germany	7194	-Germany	22134
-U.K.	6071	-U.K.	3789
Poland	1	Canada	20
Switzerland	5		
Total for Others	23,364		34,014
Others not Listed	10		8
Grand Total	23,380		34,031